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THE MARKETING OF PERISHABLE FARM PRODUCTS IN OTTAWA

E. P. REID, B. A. CAMPBELL

and

W. C. HOPPER

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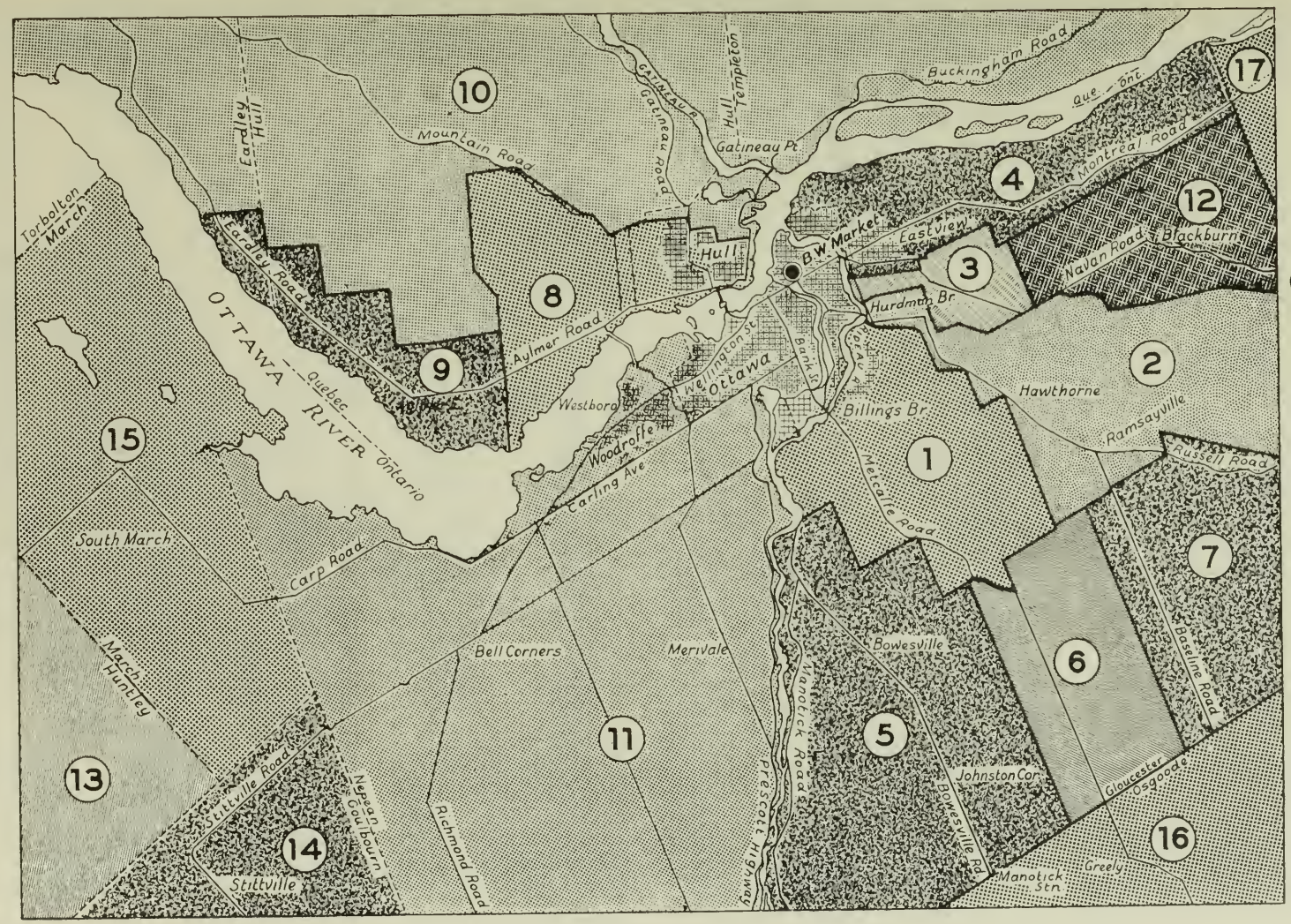

OTTAWA AND DISTRICT

DISTRICTS FROM WHICH PRODUCERS COME TO BY WARD MARKET BOUNDED THUS ——

ROADS ——

TOWNSHIP BOUNDARIES - - -

COUNTY BOUNDARIES —·—

1. BILLINGS BRIDGE AND OTTAWA
2. HURDMAN BRIDGE
3. CYRVILLE & OVERBROOK
4. EASTVIEW & MONTREAL ROAD
5. BOWESVILLE
6. METCALFE ROAD
7. BASELINE ROAD
8. HULL
9. AYLMER
10. OTHER QUEBEC
11. NEPEAN
12. NAVAN ROAD
13. HUNTLEY
14. GOULBOURN
15. MARCH
16. OSGOODE
17. RUSSELL COUNTY

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The Marketing of Perishable Farm Products in Ottawa

E. P. Reid, B. A. Campbell and W. C. Hopper*

Introduction

Significant changes have occurred in recent years in the marketing of fresh fruits and vegetables in the larger urban centres of Canada. Growth of city populations and of new residential areas distant from main shipping centres and public market squares, more widespread knowledge of the value of fresh fruits and vegetables in the diet, the private automobile, the chain store, the apartment house, and the desire on the part of city families for greater service in connection with the retailing of their food requirements, have all been important influences in changing marketing methods and increasing the demand in the cities for fresh fruits and vegetables.

In response to this increased demand, the supply of such products has been greatly enlarged and the area devoted to their production has been very much extended. Motor trucks, which have replaced horses, together with excellent highways have in large measure brought this extension about, for they have enabled farmers located in comparatively distant areas, to cater to the city markets.

The year-round volume of fruits and vegetables shipped in by rail from distant areas has also been greatly enlarged. The motor truck has made it possible for smaller centres of population to obtain, from the larger city markets, daily supplies of fruits and vegetables and other perishable farm products, and millions of dollars' worth of produce which is now received by rail and truck in the larger cities is finally consumed in households many miles away from these cities.

Changes in Public Markets.—In a number of cases public retail markets, originally built to enable producers from nearby farms to sell their produce direct to city consumers, have grown into wholesale markets where the major proportion of sales is to city retailers, pedlars and out-of-town buyers who in turn supply the needs of consumers of the city and of outside points. In some instances these markets may now be considered regional markets and in some instances provincial or national markets, because they draw produce from an extensive supply area to meet the needs of consumers in a number of centres of population.

Many existing market places, which were constructed for horse-drawn traffic at a time when none could foresee the great increase in city population, have become inadequate to accommodate the larger volume of perishable farm products brought to them by motor trucks. The location of the city market in some cases is quite unsuitable, not only because of the lack of space for sellers, but because proper parking facilities for buyers' vehicles cannot be provided except at an extremely high cost, and the purchase of adequate space in such locations would be uneconomical. City market laws and methods of market management have in some cases also remained unchanged, in spite of the need for their revision.

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* F. H. Gorsline of the Ontario Department of Agriculture assisted in the gathering, compilation and analysis of the data and in the preparation of a preliminary mimeographed report.

As a result of these new developments in production, transportation and marketing of perishable farm products, increasing interest has been manifested by producers in the need of improved marketing facilities to meet existing requirements.

In the larger cities of the United States similar conditions have been developing for some time, and a number of market studies have been conducted in recent years. The results of these studies have become known to Canadian farmers through the reading of reports and through the presentation of such results at meetings of representative producers' organizations.

Locally grown cauliflowers attract retail customers.

Origin and Purpose.—At the request of and with the co-operation of the Ontario Department of Agriculture a study of the marketing of fruits and vegetables in the city of Toronto was undertaken in 1936 by the Economics Division of the Marketing Service, Dominion Department of Agriculture. The interest shown in the results of this study led to requests by growers in the Ottawa district through their recognized organizations, for a somewhat similar study in the city of Ottawa, but with particular emphasis on a survey of By Ward Market. In response to these requests the Economics Division, with the co-operation of the Ontario Department of Agriculture, undertook this study, beginning in the latter part of 1937, and the results are presented in the following pages.

The purpose of the study was to learn the physical volume and value of fruits, vegetables and potatoes moving to Ottawa consumers from local and outside producing areas, as well as the selling channels through which the produce moved. It was necessary, also, to amass a body of pertinent information concerning the producers in the Ottawa valley. It was not possible to appraise in any way cultural practices or production costs. As a particular and

very important phase of the main project, a thorough survey was made of the By Ward Market as to volume and type of sale of all commodities offered there. Such information as would enable the offering of suggestions about changes or modifications in the market and its administration, including opinions of growers, was recorded. The By Ward Market is municipally owned and controlled.

Scope and Methods.—Information was obtained for the year ended September 30, 1937, by personal interview and by questionnaires from representative individuals of the following groups concerned with the marketing of produce in Ottawa: (*a*) vegetable, fruit and flower growers, producers of farm produce, and hucksters and truckers—all of whom were users of the By Ward Market and were interviewed at the market; (*b*) vegetable growers, farmers who produce potatoes and corn, and other sellers of sundry fresh produce in Ottawa who do not sell on the By Ward Market and who were interviewed at their gardens or farms; (*c*) retail storekeepers, wholesale fruit and vegetable dealers, and officials of grocery chains.

Part of the market area devoted to the sale of produce grown by gardeners. Photograph taken on October 12.

Detailed results of the operations of these various groups are presented in the pages which follow. As will be noted, two hundred and eighty-five Ottawa valley growers' records were taken. Seventy-two Ottawa independent retail store records showing the value of fresh fruits and vegetables handled were also obtained. Reports from four national grocery chains were tabulated and information was also obtained from the majority of the city's wholesalers and jobbers of fruits and vegetables, and from a number of truckers and meat dealers.

Full information is presented on car lot and other rail arrivals of fruits and vegetables in Ottawa, and some information on the in-and-out movement of trucked produce is also shown.

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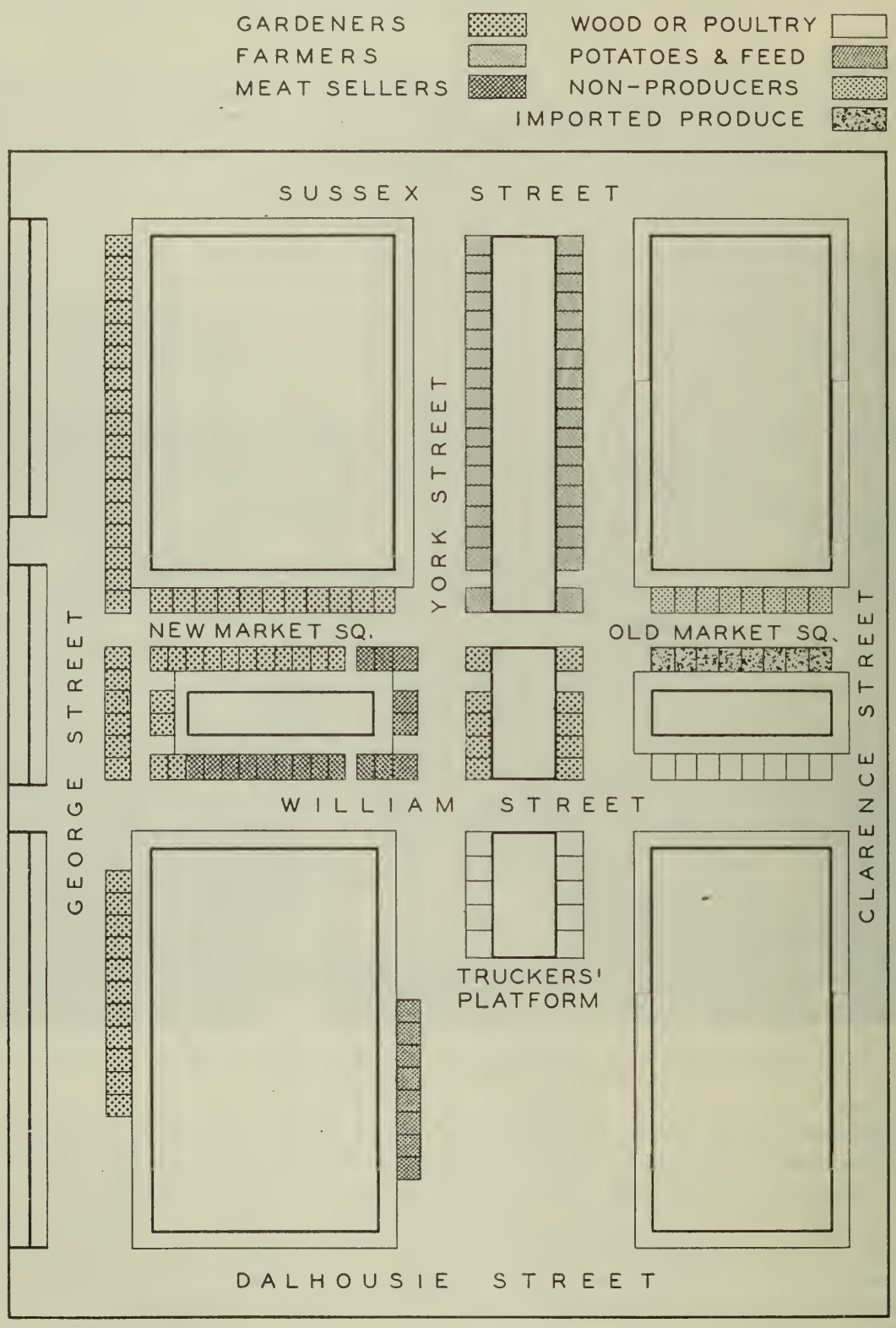
FIGURE 1: OTTAWA BY WARD MARKET

SHOWING LOCATIONS OF DIFFERENT GROUPS OF SELLERS 1937



The By Ward Market

The fresh produce market in Ottawa centres on the city-owned By Ward Market, a few blocks to the east of the centre of the downtown area. A large proportion of the locally-grown fruits and vegetables is offered for sale there by those who grow them. Several of the firms handling outside supplies of similar produce have premises facing on the market, and most of the rest are within three or four blocks, adjacent to railway sidings on Nicholas Street. The market business is both retail and wholesale.

Figure 1 is a plan of the market, showing the streets and buildings which constitute its outlines, and the parts of the various curb-lines apportioned to each class of seller. About half the stall space indicated is rented by the year, the charge per stall varying from $10 to $100 according to the desirability of position on the market. The highest fees come from stalls at the intersection of the west side of the New Market Square with George Street, while various stalls distant from this centre bring a figure at or near the minimum. All persons occupying stalls during all, or part of a day, pay a 10 cent daily fee (5 cents in the case of one-horse vehicles), the fee being the same for annual tenants as for others.

The York Street platform where poultry, eggs and other farmers' produce is sold.

For 1937 the number of annual renters was 314. These were divided as follows: 177 vegetable and flower producers, 94 farmers and poultrymen, 35 meat producers and dealers, 5 truckers and 3 hucksters and sellers of imported produce.

Market days are Tuesdays, Thursdays and Saturdays. On Saturdays, as a rule, the largest volumes are offered.

During September and October counts were made of the number of loads standing on the market in the mornings (between 8 and 9.30 o'clock) of market

days and some other days. These counts definitely represent maximum counts for any given moment of the day for which they are made, but omit account of sellers coming on the market in the stalls of those who leave before closing time.

The average count for Saturdays was 477 loads, for Thursdays 313 loads, and for Tuesdays 217 loads. For the other three days of the week, when chiefly hucksters stand on the market, the average number of loads at one time was 52. On Saturday, October 16, 519 loads were on the market at 8 a.m. Vegetable and flower growers numbered 187 of this total, and farmers, 245. The latter were a much more elastic group than the former, and on days when total counts were as low as 300, the difference was much more nearly accounted for by the absence of farmers than of gardeners. From a consideration of the maximum number of each group of sellers and from other information it was estimated that nearly 1,200 different producers and other sellers use this Ottawa market. Some 300 of the total are gardeners, and about 645 are farmers and potato growers. Some of the latter class visit the market only a few times a year.

The extent to which these various classes are sampled by records of their annual sales will be set out subsequently.

Distance of Growers From Market.—The users of the market come from all directions and from distances up to 40 and 45 miles. The average distance from market of the farms of the 285 growers sampled was 9·1 miles. The average for the gardeners' group numbering 125 was 5·1 miles. For the group of 69 farmers, including poultrymen, the average was 16 miles. For the 64 potato growers whose records were grouped the average was 11·7 miles. The trend in these averages is to be expected, inasmuch as market vegetables require much more intensive culture than potatoes and can readily be produced on more expensive land near the city, where a minimum expenditure of time and money for hauling during the long season will be necessary. Hauling increases the cost of poultry products only slightly, and a specialized poultry enterprise can operate satisfactorily on land unsuitable for market gardening. In the case of the Ottawa potato growers, the suitability of soil conditions, more than any other factor, places them just outside the general garden belt, as the average mileage shows.

From 8 to 10 townships in Carleton county, from the counties of Russell, Lanark, and Dundas and from a number of sections of Quebec province, came market users included in the 285 recorded in this survey. Details as to numbers and volume of produce will be presented later.

Routes Used by Growers.—To some extent the directions from which growers come to market and also the various routes through the city which they use are shown in table 1, as well as in figure 2.

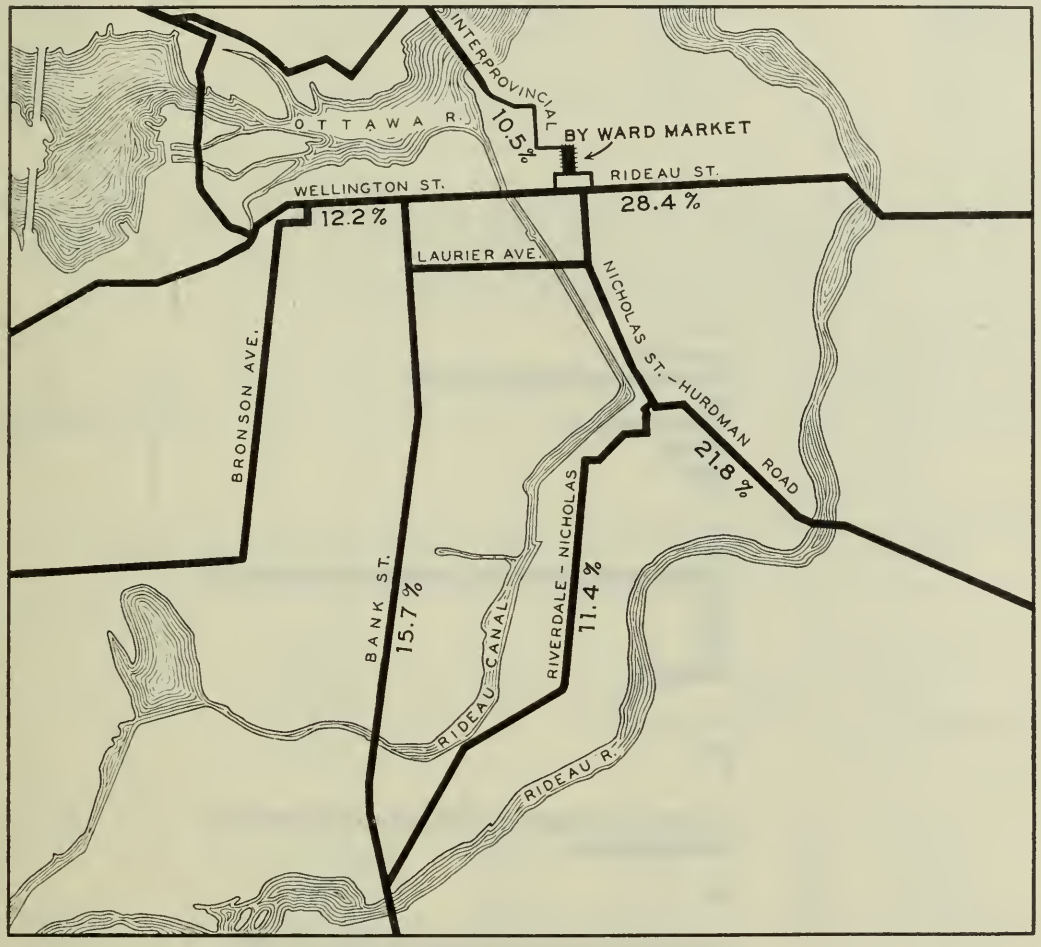
TABLE 1.—Routes Through Ottawa to the By Ward Market of 229 Growers, with Percentage of Growers Using Each Route, 1937

Route	No. of growers using each route	Percentage
Rideau Street (Cummings Bridge)	65	28·4
Nicholas Street (Hurdman's Bridge)	50	21·8
Bank Street (Billings Bridge and Carling Avenue)	36	15·7
Wellington Street (Chaudière Bridge, Richmond Road and Bronson Avenue)	28	12·2
Riverdale Avenue and Nicholas Street	26	11·4
Sussex Street (Interprovincial Bridge)	24	10·5
Total sample	229	100·0

Growers' Sales to Different Classes of Buyers

Two hundred and eighty-five records were obtained from growers, in connection with the Ottawa By Ward Market survey. These are grouped into four different classes. One hundred and twenty-five were fruit, vegetable and flower gardeners selling partly or totally on the By Ward Market, 69 were farmers who sold produce on the York Street platform, 64 were growers who specialized in growing potatoes or potatoes and corn, while the remaining 27 were gardeners who did not patronize the By Ward Market. Figure 3 shows the percentage distribution for each class by commodity groups.

FIGURE 2: ROUTES THROUGH OTTAWA BY WHICH 229 GROWERS ARRIVED AT BY WARD MARKET BY PERCENTAGES OF NUMBERS OF GROWERS USING EACH ROUTE.



The total value of produce sold by 285 growers in Ottawa amounted to $606,934, of which 58·6 per cent, or $355,542 worth, was sold on By Ward Market (Table 2). Vegetables made up 43 per cent of this total. Poultry products were 21·0 per cent of the total, potatoes 13·5, animal products 9·1 and flowers 7·0 per cent.

TABLE 2.—Value of Different Kinds of Produce Sold to Different Classes of Buyers by 285 Gardeners and Farmers in Ottawa District, 1937

Type of Produce	Total sales	By Ward Market	Independent Stores	Consumers	Chain Stores	Wholesalers and Jobbers	Others
	$	$	$	$	$	$	$
By value							
Vegetables	262,884	171,931	39,528	5,302	10,710	11,214	24,199
Potatoes	82,060	30,877	24,275	4,849	200	10,801	11,058
Fruits	23,739	10,518	6,100	4,119	272	547	2,183
Poultry products	127,344	72,999	6,897	11,172	141	27,850	8,285
Animal products	55,121	40,690	796	5,974	.....	698	6,963
Flowers	42,586	24,603	2,128	7,140	.....	8,000	715
Other products	13,200	3,924	410	1,567	.....	2,395	4,904
Total	606,934	355,542	80,134	40,123	11,323	61,505	58,307
Percentage %	100·0	58·6	13·2	6·6	1·9	10·1	9·8
By percentage							
Vegetables	43·3	48·4	49·4	13·2	94·6	18·2	41·5
Potatoes	13·5	8·7	30·3	12·1	1·8	17·6	19·0
Fruits	4·0	3·0	7·6	10·3	2·4	0·9	3·8
Poultry products	21·0	20·5	8·6	27·8	1·2	45·3	14·2
Animal products	9·1	11·4	1·0	14·9	.....	1·1	11·9
Flowers	7·0	6·9	2·6	17·8	.....	13·0	1·2
Other products	1·2	1·1	0·5	3·9	.....	3·9	8·4
Total	100·0	100·0	100·0	100·0	100·0	100·0	100·0

FIGURE 3: PERCENTAGE DISTRIBUTION OF GROWERS' SALES IN OTTAWA OCTOBER 1936 – SEPTEMBER 1937

EACH GROUP REPRESENTS 100%

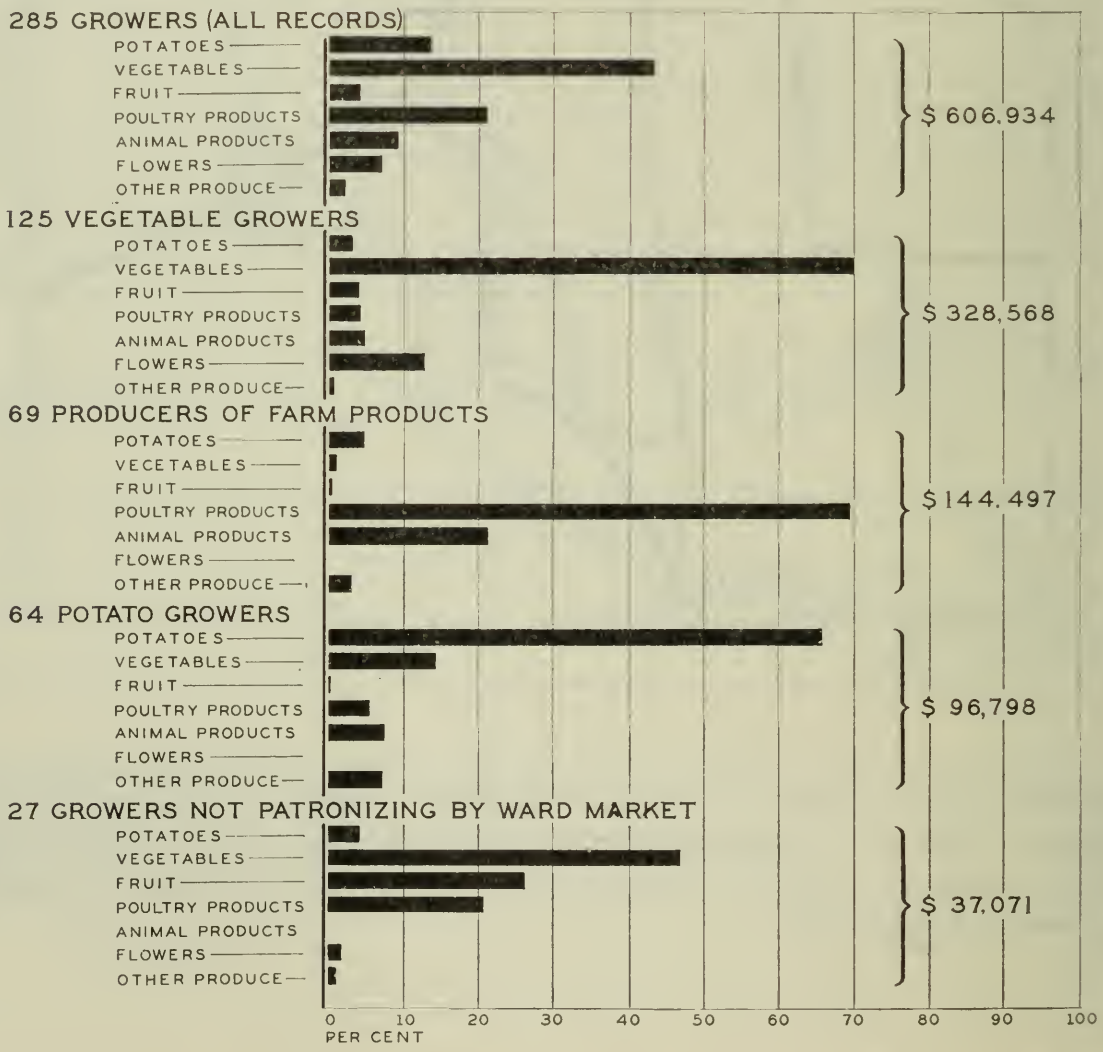


TABLE 3.—Value of Produce of Different Kinds sold to Different Classes of Buyers on the By Ward Market by 285 Gardeners and Farmers in Ottawa District, 1937

Type of Produce	Total Sales	Independent Stores	Consumers	Chain Stores	Wholesalers and Jobbers	Others
	$	$	$	$	$	$
By value						
Vegetables	171,931	45,940	59,533	7,261	15,807	43,390
Potatoes	30,877	7,145	11,461	550	4,015	7,706
Fruit	10,518	2,904	4,518	526	552	2,018
Poultry products	72,999	3,346	53,537	389	13,374	2,353
Animal products	40,690	9,631	26,718	.....	1,026	3,315
Flowers	24,603	1,907	22,268	.....	250	178
Other products	3,924	50	2,210	.....	567	1,097
Total	355,542	70,923	180,245	8,726	35,591	60,057
	%	%	%	%	%	%
By percentage						
Vegetables	100·0	26·7	34·6	4·2	9·2	25·3
Potatoes	100·0	23·1	37·1	1·8	13·0	25·0
Fruit	100·0	27·6	43·0	5·0	5·2	19·2
Poultry products	100·0	4·6	73·3	0·5	18·3	3·2
Animal products	100·0	23·7	65·7	.....	2·5	8·1
Flowers	100·0	7·8	90·5	.....	1·0	0·7
Other products	100·0	1·3	56·3	.....	14·5	27·9
Total	100·0	19·9	50·7	2·5	10·0	16·9

Consumers bought 50·7 per cent of all produce sold on the By Ward Market but only 34·6 per cent of the vegetables (Table 3). Other agencies not classified in table 3, but which accounted for 25·3 per cent of the vegetable total include pedlars, market hucksters, hotels and restaurants, truckers and out-of-town buyers.

Table 4 shows the total amount each class of buyer purchased from the 285 growers. Direct sales as well as sales through the By Ward Market are included.

TABLE 4.—Value of Different Kinds of Produce and Ultimate Classes of Buyers of all Produce Sold in Ottawa by 285 Gardeners and Farmers in the Ottawa District, 1937

Type of Produce	Total sales Including By Ward Market Sales	Independent Stores	Consumers	Chain Stores	Wholesalers and Jobbers	Others
	$	$	$	$	$	$
By value						
Vegetables	262,884	85,468	64,835	17,971	27,021	67,589
Potatoes	82,060	31,420	16,310	750	14,816	18,764
Fruit	23,739	9,004	8,637	798	1,099	4,201
Poultry products	127,344	10,243	64,709	530	41,224	10,638
Animal products	55,121	10,427	32,692	.....	1,724	10,278
Flowers	42,586	4,035	29,408	.....	8,250	893
Other products	13,200	460	3,777	.....	2,962	6,001
Total	606,934	151,057	220,368	20,049	97,096	118,364
	%	%	%	%	%	%
Vegetables	100·0	32·5	24·7	6·8	10·3	25·7
Potatoes	100·0	38·3	19·9	0·9	18·0	22·9
Fruit	100·0	37·9	36·4	3·4	4·6	17·4
Poultry products	100·0	8·0	50·8	0·4	32·4	8·4
Animal products	100·0	18·9	59·3	.....	3·1	18·7
Flowers	100·0	9·5	69·0	.....	19·4	2·1
Other products	100·0	3·5	28·6	.....	22·4	45·5
Total	100·0	24·9	36·3	3·3	16·0	19·5

About 36 per cent of all produce sold by the 285 growers was sold to consumers direct, 24·9 per cent to independent retail stores, 16·0 per cent to wholesalers and jobbers (for resale to chain stores, independent retail stores, and for shipment out of Ottawa), and 3·3 per cent to chain stores. The remaining 19·5 per cent went to other buyers, including pedlars, hucksters, and hotels and restaurants.

TABLE 5.—Ottawa By Ward Market Sales by Different Classes of Sellers to Different Classes of Buyers, 258 Gardeners and Farmers, 1937

Class of seller	Number in each class	Total sales	Independent stores	Consumers	Chain stores	Wholesalers and Jobbers	Others
	No.	$	$	$	$	$	$
By value							
Gardeners	125	232,569	55,321	103,553	8,270	16,135	49.290
Farmers	69	93,010	8,010	70,074	389	13,177	1,360
Potato growers	64	29,963	7,592	6,618	67	6,279	9,407
Total	258	355,542	70,923	180,245	8,726	35,591	60,057
	Number	%	%	%	%	%	%
By percentage							
Gardeners	125	100·0	23·8	44·5	3·6	6·9	21·2
Farmers	69	100·0	8·6	75·3	0·4	14·2	1·5
Potato growers	64	100·0	25·3	22·1	0·2	21·0	31·4
Total	258	100·0	19·9	50·7	2·5	10·0	16·9

The gardeners, who brought mostly vegetables and flowers to the By Ward Market, made about 44 per cent of their sales on the market direct to consumers or Ottawa householders (Table 5). Three-quarters of the By Ward Market sales of farmers who handled largely poultry and animal products were to consumers, while potato growers, on the other hand, made only 22 per cent of their sales to consumers. Included under the heading of other buyers of the products of gardeners and of potato growers, who handled sweet corn as well as potatoes, were market hucksters, truckers, and hotels and restaurants.

TABLE 6.—Value of Different Kinds of Produce and Ultimate Classes of Buyers of All Produce Sold by 125 Gardeners in the Ottawa District, 1937

Type of produce	Total sales including By Ward Market sales	Independent stores	Consumers	Chain stores	Wholesalers and jobbers	Others
	$	$	$	$	$	$
By value						
Vegetables	230,143	74,655	59,851	15,920	24,150	55,567
Potatoes	10,480	2,490	4,629	550	132	2,679
Fruit	13,220	4,291	4,503	526	694	3,206
Poultry products	13,970	3,005	7,647	.....	403	2,915
Animal products	17,186	2,959	8,144	.....	922	5,161
Flowers	41,963	4,020	29,065	.....	8,250	628
Other products	1,606	.....	120	.....	18	1,468
Total	328,568	91,420	113,959	16,996	34,569	71,624
	%	%	%	%	%	%
By percentage						
Vegetables	100·0	32·4	26·0	6·9	10·5	24·2
Potatoes	100·0	23·8	44·2	5·2	1·3	25·5
Fruit	100·0	32·4	34·1	4·0	5·2	24·3
Poultry products	100·0	21·5	54·7	.....	2·9	20·9
Animal products	100·0	17·2	47·4	.....	5·4	30·0
Flowers	100·0	9·6	69·3	.....	19·6	1·5
Other products	100·0	.....	7·5	.....	1·1	91·4
Total	100·0	27·8	34·7	5·2	10·5	21·8

Sales by Gardeners

A small percentage of the gardeners sell only in wholesale quantities but the majority sell to both wholesale and retail customers. To do this it is necessary for the grower to stay on the market most of the day to finish selling his produce even though he may have sold most of it during the first few hours of wholesale trading in the morning. A market such as this naturally leads to such practices on the part of some gardeners as that of purchasing other produce in order to keep a good display.

Flower sales on the market are almost entirely retail (90·0 per cent) and the flower gardeners' section should for this reason be situated in a position where the consumer will have easy access to it.

In table 6 the value of sales to the ultimate classes of buyers of the $328,568 worth of produce sold by the 125 gardeners of the Ottawa district is given; sales per gardener were $2,629. More than one-third was sold to consumers either direct from the farm or through the By Ward Market, while more than one-quarter was sold to independent retail stores. However, consumers purchased just slightly over one-quarter of the vegetable total direct, and independent stores were the largest class of vegetable buyers.

Sales by Farmers

Total sales of 69 farmers, including By Ward Market sales, amounted to $144,497, or $2,094 per farmer (Table 7).

Table 7.—Value of Different Kinds of Produce and Ultimate Classes of Buyers of All Produce Sold by 69 Farmers in Ottawa District, 1935

Type of produce	Total sales including By Ward Market sales	Independent stores	Consumers	Chain stores	Wholesalers and jobbers	Others
By value	$	$	$	$	$	$
Vegetables	1,621	217	1,017	.....	.....	387
Potatoes	6,737	1,974	3,609	200	271	683
Fruit	629	31	580	15	.....	3
Poultry products	100,525	4,538	48,857	530	40,329	6,271
Animal products	30,653	6,331	22,306	.....	377	1,639
Other products	4,332	460	2,537	.....	304	1,031
Total	144,497	13,551	78,906	745	41,281	10,014
By percentage	%	%	%	%	%	%
Vegetables	100·0	13·4	62·7	.....	.....	23·9
Potatoes	100·0	29·3	53·6	3·0	4·0	10·1
Fruit	100·0	4·9	92·2	2·4	.....	0·5
Poultry products	100·0	4·5	48·6	0·5	40·1	6·3
Animal products	100·0	20·6	72·8	.....	1·2	5·4
Other products	100·0	10·6	58·6	.....	7·0	23·8
Total	100·0	9·4	54·6	0·5	28·6	6·9

Consumers bought, either at their door or through the By Ward Market, produce valued at $78,906. This represented 54·6 per cent of all produce sold by the 69 farmers in the Ottawa district. Wholesalers and jobbers were the next largest buyers taking 28·6 per cent of the produce, chiefly poultry and eggs, while the purchases of independent stores, 9·4 per cent, were composed chiefly of potatoes and meat. Many of the farmers specialized in poultry, indeed, nearly 70 per cent of the value of the total sales were poultry and eggs. This emphasis on poultry and particularly on eggs results in a volume which is too

large to dispose of to customers alone, and the surplus must be marketed through wholesalers and jobbers.

Sales by Potato Growers

TABLE 8.—Value of Different Kinds of Produce and Ultimate Classes of Buyers of All Produce Sold by 64 Potato Growers in the Ottawa District, 1937

Type of Produce	Total sales including By Ward Market sales	Independent stores	Consumers	Chain stores	Wholesalers and jobbers	Truckers	Others
By value	$	$	$	$	$	$	$
Vegetables	13,782	2,664	484	67	2,635	5,449	2,483
Potatoes	63,375	26,592	7,475	.....	14,315	7,009	7,984
Fruits	162	38	29	.....	.....	.....	95
Poultry products	5,235	968	2,925	.....	492	472	378
Animal products	7,282	1,137	2,242	.....	425	1,680	1,798
Others	6,962	.....	1,120	.....	2,558	98	3,186
Total	96,798	31,399	14,275	67	20,425	14,708	15,924
By percentage	%	%	%	%	%	%	%
Vegetables	100·0	19·3	3·5	0·5	19·2	39·5	18·0
Potatoes	100·0	42·0	11·8	.....	22·6	11·0	12·6
Fruits	100·0	23·5	17·9	.....	.....	.....	58·6
Poultry products	100·0	18·5	55·9	.....	9·4	9·0	7·2
Animal products	100·0	15·6	30·8	.....	5·8	23·1	24·7
Others	100·0	.....	16·1	.....	36·7	1·4	45·8
Total	100·0	32·4	14·7	0·1	21·1	15·2	16·5

TABLE 9.—Value of Different Kinds of Produce and Ultimate Classes of Buyers of all Produce Sold by 27 Growers in the Ottawa District Who Did Not Use the By Ward Market, 1937

Type of produce	Total sales including By Ward Market sales	Independent stores	Consumers	Chain stores	Wholesalers and jobbers	Others
By value	$	$	$	$	$	$
Vegetables	17,338	7,932	3,483	1,984	236	3,703
Potatoes	1,468	364	597	.....	98	409
Fruits	9,728	4,644	3,525	257	405	897
Poultry products	7,614	1,732	5,280	.....	.....	602
Animal products	.....	.....	.....	.....	.....	.....
Flowers	623	15	343	.....	.....	265
Other products	300	.....	.....	.....	82	218
Total	37,701	14,687	13,228	2,241	821	6,094
By percentage	%	%	%	%	%	%
Vegetables	100·0	45·8	20·1	11·4	1·4	21·3
Potatoes	100·0	24·8	40·7	.....	6·7	27·8
Fruits	100·0	47·7	36·2	2·7	4·2	9·2
Poultry products	100·0	22·7	69·4	.....	.....	7·9
Animal products	100·0	.....	.....	.....	.....	.....
Flowers	100·0	2·4	55·1	.....	.....	42·5
Other products	100·0	.....	.....	.....	27·3	72·7
Total	100·0	39·6	35·7	6·1	2·2	16·4

By Ward Market sales plus direct sales of the 64 potato growers from whom records were obtained amounted to $96,798 (Table 8). In addition to potatoes, these growers handled some vegetables, which consisted mainly of sweet corn, and some poultry and animal products. Potatoes were sold to independent retail stores to the extent of 42 per cent of all sales. Sales of potatoes to jobbers were about half the store sales, and those to the other classes shown were nearly equal to each other and about one-quarter of store sales. The extent of the "export" nature of the corn sales of the district is suggested by the proportion of 39 per cent which truckers purchased, although not all of this was transported away. Stores and jobbers with about 19 per cent each, took most of the rest. In poultry and animal products, consumer purchases were outstanding in this distribution though more markedly so for the former. For all products, independent storekeepers were the purchasers of the greatest amount from these growers, and jobbers were in second place in that respect.

Sales by Growers not Using the By Ward Market

Sales by the group of 27 growers who did not use the By Ward Market totalled $37,071, representing an average per grower of $1,375 (Table 9). Fruits, chiefly apples, raspberries and strawberries, were quite an important item. The season for most of these fruits is comparatively short, and as market stalls are rented on a yearly basis, there is a tendency for these producers to sell direct to the various purchasers without using the market. Most of the growers in this group had a well established route either with consumers or with retail stores as the figures show that more than 75 per cent of the sales went to these two agencies. Fruit sales to other agencies were made up largely of sales to freezing plants.

Sales by Truckers

Total sales of fourteen truckers from whom records were obtained on the By Ward Market represented 36·8 per cent of all produce sold by this group, based on load counts on the market for the months of September and October, 1937. Table 10 shows the actual sales of the fourteen truckers and also the estimated value of all sales by such dealers.

TABLE 10.—Sales by Truckers on By Ward Market during the Year Ended September 30, 1937

—	Actual sale by 14 truckers	Estimated sales by all truckers
	$	$
Fruits	27,190	75,500
Potatoes	19,485	54,050
Poultry products	8,062	21,900
Total	55,637	151,450

Of the sales of fruits by truckers, very little was grown locally. Apples were trucked from Prince Edward county and Kemptville district, while the occasional load of grapes and peaches during the fall season came from the Niagara district.

Potatoes for the most part were brought in from Montreal and the Bowesville district as well as other districts of Ontario. The poultry sold by truckers consisted of live as well as dressed fowl.

Sales by Meat Dealers

The total value of meat sold on the market has been based on the total number of carcasses inspected by the City Meat Inspector. According to estimates, approximately 25 per cent of the total inspections were of meat sold on the By Ward Market. In table 11 the value by months and by kind of meat sold by farmers and meat dealers is shown. Total sales were estimated at $233,173.

TABLE 11.—Value by Months of Meat of Various Kinds Sold on the By Ward Market During the Year Ended September 30, 1937

——	Hogs	Lambs	Calves	Beef	Total	Per cent
	$	$	$	$	$	$
1936						
October	8,664	3,396	6,279	5,738	24,077	10·3
November	10,024	2,734	3,636	11,200	27,594	11·8
December	11,053	1,440	2,691	7,692	22,876	9·8
1937						
January	8,249	665	2,032	4,056	15,002	6·4
February	7,615	475	2,093	4,238	14,421	6·2
March	8,140	449	4,442	4,275	17,306	7·4
April	7,524	1,272	7,517	5,260	21,573	9·3
May	6,402	567	5,805	4,895	17,669	7·6
June	4,297	1,845	5,028	4,250	15,420	6·6
July	5,947	2,505	4,092	4,615	17,159	7·4
August	6,383	2,543	2,983	6,240	18,149	7·8
September	9,242	2,397	4,763	5,525	21,927	9·4
Total	93,540	20,288	51,361	67,984	233,173	100·0

Of this amount it is estimated that $110,968 worth was sold by producers and farmers. This leaves sales of $122,205 which represent the total estimated sales of meat dealers selling on the By Ward Market. These dealers for the most part are drovers and truckers who buy in the country. The sales of retail meat stores located on the By Ward Market are not included in these figures.

Total Sales of All Kinds of Produce by All Sellers on the By Ward Market

The total estimated sales of all kinds of produce on the By Ward Market during the year ended September 30, 1937, amounted to $1,013,586 (Table 12). Of this total, vegetables represented about 24 per cent, animal products 23 per cent, potatoes 20 per cent and poultry products 18 per cent. The balance was made up of fruit, flowers and miscellaneous commodities.

TABLE 12.—Total Estimated Value of All Produce Sold on the By Ward Market During the Year Ended September 30, 1937

——	Value	Per cent
	$	
Vegetables	239,155	23·6
Fruit	91,844	9·1
Poultry products	186,265	18·4
Animal products	233,173	22·9
Flowers	47,286	4·7
Potatoes	206,210	20·3
Other products	9,653	1·0
Total	1,013,586	100·0

Location of Growers

For the purpose of this survey, arbitrary divisions for the districts around Ottawa have been mapped out and are shown in Figure 4. The $606,934 worth of produce sold by the 285 growers is divided according to its origin in 11 divisions as shown in table 13. Several of the original districts are combined in order not to show the value of produce from less than three farms. The total value of produce coming from each location is shown for each of the five groups and figure 4 presents in graphic form the importance of the various districts.

TABLE 13.—Value of Produce From Various Districts and Main Sources of Income of 285 Growers, 1937

Location	Number of records	Total value as shown by records		Main source of income	Value of main source of income	
	No.	$	%		$	%
Billings Bridge and Ottawa	29	105,687	17·4	Vegetables	76,960	72·8
Hurdman's Bridge	23	53,471	8·8	Vegetables	16,976	31·7
Cyrville	33	69,349	11·4	Vegetables	55,715	80·3
Eastview	24	56,798	9·4	Vegetables	42,300	74·5
Nepean Township	29	43,390	7·1	Vegetables	15,507	35·7
Quebec Province	26	52,605	8·7	Vegetables	33,475	63·6
Bowesville District	29	62,251	10·3	Potatoes	36,637	58·9
Metcalfe and Baseline Roads Districts	18	18,264	3·0	Potatoes	12,475	68·3
Osgoode Township	31	36,569	6·0	Potatoes	16,757	45·8
Russell County	22	30,868	5·1	Poultry	14,708	47·6
Others	21	77,682	12·8	Poultry	63,566	81·8
Total	285	606,934	100·0	.....	.....	.....

Billings Bridge and Ottawa City accounted for 17·4 per cent of the growers' produce coming to market and of the $105,687 from this area 73 per cent or $76,960 worth was vegetables. Cyrville was the next most important area, while the Bowesville district, important for potato and corn growing, was responsible for 10·3 per cent. Vegetables were the main source of income from six of the districts, potatoes from three and poultry from the remaining two.

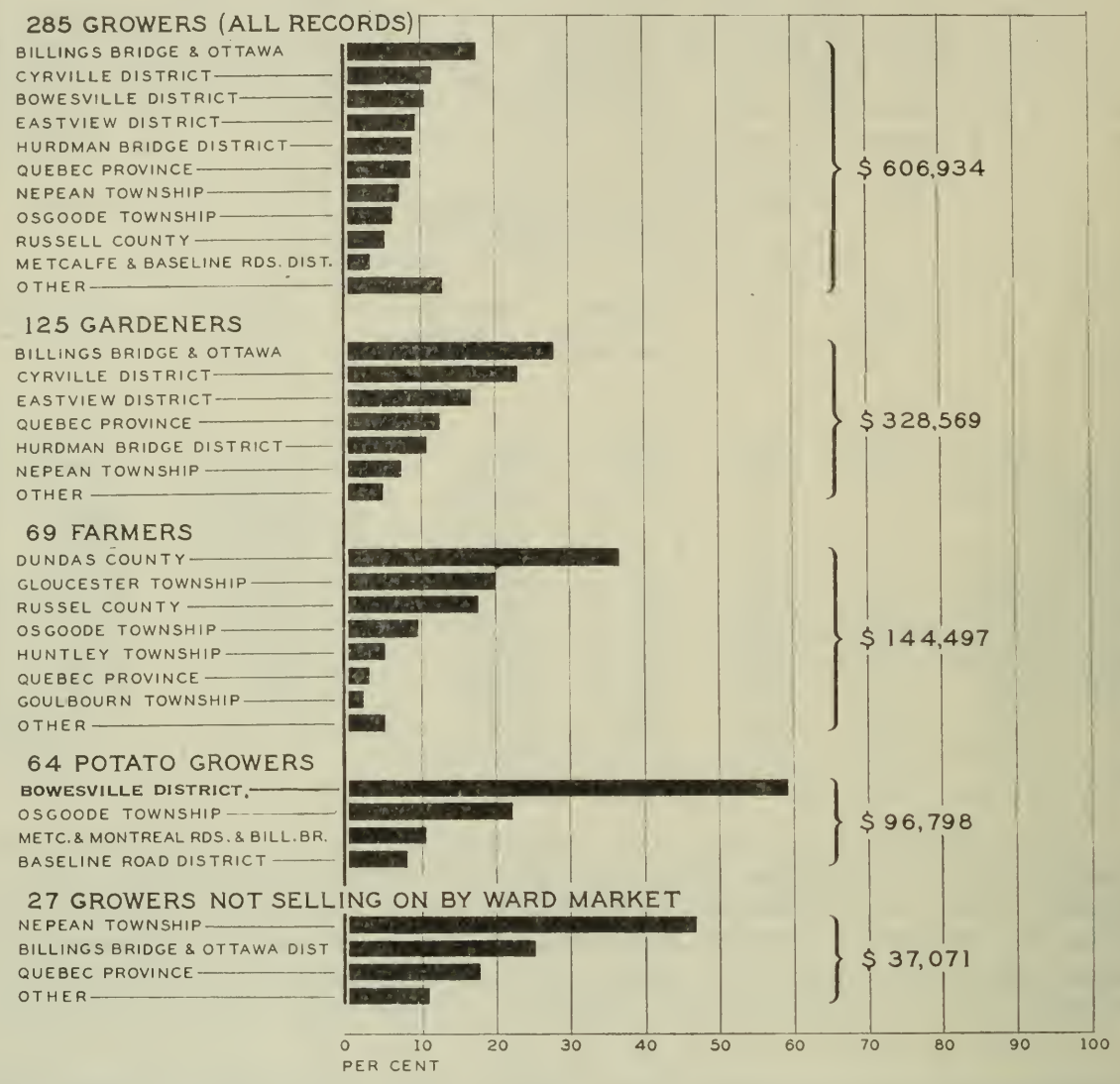
The 125 gardeners' records showed that most of the vegetables came from growing areas east of the By Ward Market. The four areas, Billings Bridge, Cyrville, Eastview, and Hurdman's Bridge accounted for 75 per cent of all produce brought in by gardeners (Figure 4).

As far as farmers are concerned, township boundaries tended to give a better natural division. Gloucester township, Carleton county, was the source of only 20 per cent of all produce brought in by the 69 farmers. Dundas and Russell counties and Osgoode township in Carleton county were the important sections from which the farmers selling on the York Street platform brought produce, as these three areas accounted for 64 per cent of all farm produce sold by the 69 farmers from which records were obtained.

The three main potato districts around Ottawa are Bowesville, Osgoode, and Baseline road, as these three areas accounted for 90 per cent of local potato sales in Ottawa.

Twelve of the 27 growers who did not patronize the By Ward Market were from Nepean township. Some of these growers sold on the West End Market, which is located in the western part of the city. The West End Market is also under the administration of the city. However, many of this class of growers have been long established, have built up a store and consumer trade over a long period of years, and are not dependent on sales on the By Ward Market.

FIGURE 4: PERCENTAGE DISTRIBUTION OF VALUE BY DISTRICTS OF GROWERS' PRODUCE OCTOBER 1936 – SEPTEMBER 1937.
(EACH GROUP REPRESENTS 100%)



Main Source of Income

In order to obtain an idea of the type of farming carried on by the different classes, each grower was asked to give his main source of income. The summary for all of the 285 growers from whom records were obtained is given in table 14

TABLE 14.—Main Source of Income of the 285 Ottawa District Growers and Total Value of Produce Sold by Each Group, 1937

Source of Income	Number of records	Total value		Total value of main source of income	
		$	%	$	%
Vegetables	95	242,525	40·0	213,894	88·2
Potatoes	29	41,827	6·9	30,852	73·8
Potatoes and corn	16	33,480	5·5	29,443	87·9
Flowers	20	43,167	7·1	34,902	80·9
Fruits and vegetables	18	34,422	5·7	29,388	85·4
Dairy or live stock	57	105,195	17·3	35,231	33·5
Poultry	13	61,372	10·1	55,913	91·1
Others	37	44,946	7·4	14,058	31·3
Total	285	606,934	100·0	.....	.....

and shows that of these 285 growers, 95 had vegetables as a main source of income and were responsible for 40 per cent of the total produce sold by all the 285 growers. The value of sales of the 95 vegetable specialists was $242,525 of which 88·2 per cent or $213,894 worth represented sales of vegetables.

Dairy and live stock farmers accounted for 17·3 per cent of produce sold by all growers but only one-third of this total was made up of animal products such as butter, cream, etc., but practically excluding milk, for only the comparatively small amounts were recorded which were sold on the market. This class of producer tends to have as side lines, poultry raising, honey or vegetable production, and it is these products that are sold on the market together with their cream and meat.

Kind of Vehicle used by Growers

For the purpose of observing changing marketing methods, information as to the kind of vehicle used for transporting produce to market was obtained from each grower interviewed. The value brought in by each kind of vehicle was recorded as well as the number of loads and the value per load. Table 15 gives the summary for all growers.

TABLE 15.—Kind of Vehicle Used by 285 Ottawa District Growers, Value of Produce Handled By Each Type of Vehicle, Number of Loads and Value Per Load for Each Type of Vehicle, 1937

Vehicle	Number of records	Value of produce	Number of loads	Value per load
	No.	$	No.	$
Motor Trucks—				
½-ton	24	53,008	2,170	24·42
¾- and 1-ton	46	115,963	3,970	29·20
1½-ton	39	91,652	3,015	30·40
2-ton	13	31,284	1,047	29·88
Total Trucks	122	291,907	10,202	28·61
Wagons—				
1-horse	43	48,484	3,330	14·56
2-horse	11	15,201	467	32·50
Total Wagons	54	63,685	3,797	16·77
Motor Cars—				
Car	64	108,735	3,297	32·97
Car and trailer	20	30,654	1,221	25·10
Total Motor Cars	84	139,389	4,518	30·85
Other Vehicles—				
Other vehicles	10	96,820	1,626	59·54
None or hired	25	15,133	107	.....
All Vehicles	285	606,934	20,250	29·97

Of the 285 growers from which records were obtained, 122 brought their produce to market by motor trucks, varying in size from ½ ton to 2 tons capacity, 54 used a horse-drawn vehicle, while 84 used either a car or a car and trailer. Twenty-five of those interviewed hired trucks or sold to buyers direct at the farm. Value per load in the case of trucks ranged from $24.42 for the ½ ton to $30.40 for the 1½ ton truck.

The average value per load for each type of vehicle is fairly significant. The average for trucks was $28.61, while that for horse-drawn vehicles which are not capable of carrying the same size of load, was $16.77. The motor car and car and trailer was used chiefly by farmers who transported farm produce of a higher value per unit and averaged $30.85.

Gardeners' records showed the 1½ ton trucks to be most popular with 30 of the 125 growers. They brought to the market produce valued at $153,167 and averaging $47.45 per load.

Seasonal Trends

Information was obtained from all growers interviewed as to the number of loads taken to market each month during the course of the year ended September 30, 1937. This serves to give a general idea of seasonal activity on the By Ward Market, though it does not take into consideration size or value of loads. This information has been tabulated for the two groups, gardeners and farmers, and information is given in table 16, as well as being shown graphically in figures 5 and 6.

TABLE 16.—Number of Loads and Percentage Distribution by Months and Seasons of Number of Loads Brought to Market by 125 Gardeners and 69 Farmers Selling on the By Ward Market, October 1, 1936-September 30, 1937

Month	Gardeners			Farmers		
	Number of loads	Percentage by months	Percentage by seasons	Number of loads	Percentage by months	Percentage by seasons
	No.	%	%	No.	%	%
1936						
October	1,367	11·5		367	9·6	
November	801	6·8	22·5	344	9·0	27·4
December	503	4·2		334	8·8	
1937						
January	314	2·7		375	9·9	
February	294	2·5	7·9	325	8·5	26·7
March	325	2·7		316	8·3	
April	536	4·5		275	7·2	
May	1,050	8·9	25·9	244	6·4	20·8
June	1,479	12·5		276	7·2	
July	1,789	15·1		288	7·6	
August	1,826	15·4	43·7	336	8·8	25·1
September	1,559	13·2		332	8·7	
Year	11,843	100·0	100·0	3,812	100·0	100·0

It can readily be seen from these figures that gardeners and farmers differ greatly in their marketing habits. The 125 gardeners brought in 11,843 loads or an average of 93 loads each, 70 per cent of which were brought in during the period April 1-September 30. The farmers, on the other hand, brought in 3,812 loads or an average of 55 loads each, only 45 per cent of which were brought in during the corresponding summer period. If the monthly graph (Figures 5 and 6), for the gardeners is studied it may be noted that from a low of 2·5 per cent of the year's total for the month of February, the percentage increased gradually until May and then rose more rapidly to the monthly high of 15·4 per cent in August, after which time there was a gradual, then a sudden drop back to the February low. This trend develops because garden produce is seasonal and the only business done from November to April is the sale of produce that can be stored or grown under glass.

The volume of farmers' loads reached a low point in April, May and June, the time when such work as ploughing and seeding takes a larger portion of their time, and increased gradually till October, dropped slightly and then reached its highest point during January. The rise and fall within such a short range is hardly significant. The important point is that farmers are on the market, winter and summer, on an open platform, with little or no protection to themselves or for the produce they are selling.

FIGURE 5: MONTHLY & SEASONAL DISTRIBUTION OF TOTAL NUMBER OF LOADS BROUGHT TO OTTAWA BY 125 GARDENERS SELLING ON BY WARD MARKET. OCT. 1936 – SEPT. 1937

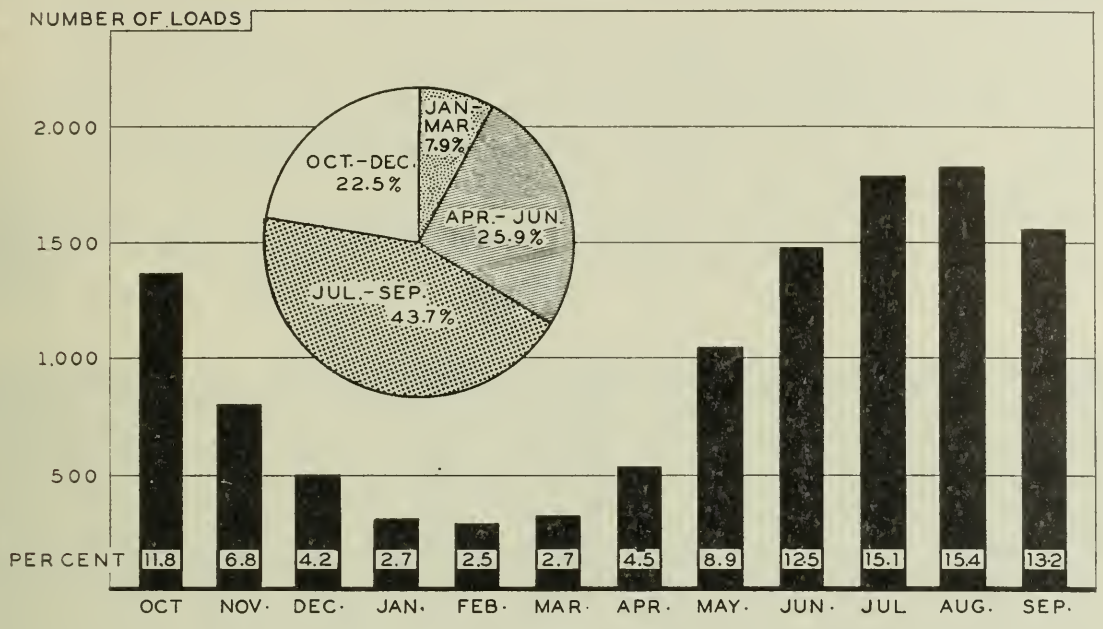
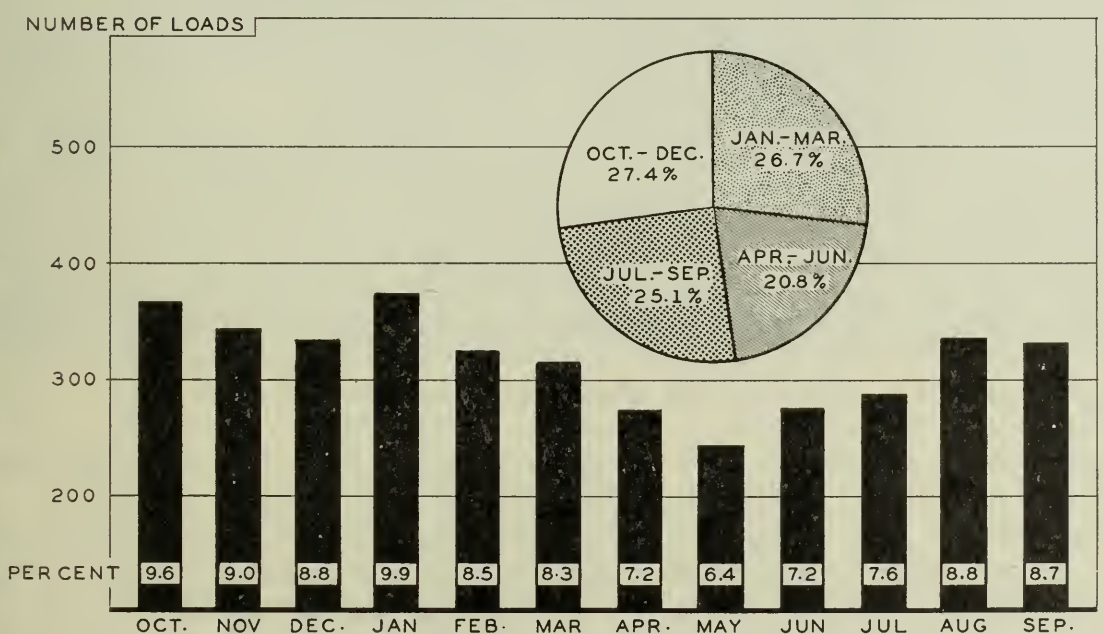


FIGURE 6: MONTHLY & SEASONAL DISTRIBUTION OF TOTAL NUMBER OF LOADS BROUGHT TO OTTAWA BY 69 FARMERS SELLING ON BY WARD MARKET. OCT. 1936 – SEPT. 1937



Opinions and Suggestions of Growers regarding Improvement of By Ward Market

All growers were given an opportunity to express their views as to how the By Ward Market might be improved. Of the 285 interviewed, 37 had no suggestions to offer and 187 growers offered 236 suggestions for changes in the present market. Table 17 presents a summary of the suggested changes and improvements.

TABLE 17.—Suggestions for changes at By Ward Maket made by 187 Growers

Suggested change	Number of Growers making each Suggestion				
	Total	Gardeners	Farmers	Potato growers	Growers not using By Ward Market
	No.	No.	No.	No.	No.
Covered market	65	26	32	7	.....
Segregation or elimination of hucksters[1]	44	34	2	6	2
Control of truckers	24	9	1	9	5
More facilities	22	9	7	5	1
Control of imported produce	21	16	3	1	1
Lower marketing costs	14	5	6	2	1
Wider stalls	12	11	1	.....	.....
All others[2]	34	14	11	8	1
Total	236	124	63	38	11

[1] Since this study was made all non-producers have been separated from producers and painted signs now indicate to buyers which sellers are producers and which are not.

[2] Includes remodelling new market building for use of growers and opening rear entrance for stores located on the site of the market.

Growers who did not use the By Ward Market, or who only used it infrequently, gave a number of reasons for selling produce elsewhere. The reasons mentioned most frequently were established trade elsewhere, market facilities insufficient—particularly lack of space and exposure to weather, better prices obtainable elsewhere, loss of time selling on market. Other reasons included the need for a new market, the remodelling of a new market building for the use of growers and the opening of a rear entrance for stores located on the market.

The demand for a covered market was much more evident among the farmers than the vegetable growers, as parts of the gardeners' market are already covered, while the farmers' section is situated on a platform unprotected from the weather. During the summer, umbrellas are used as makeshift shelters, but these fail to protect the produce from the radiated heat of the pavement. During the winter, the farmers in the uncovered section are at an even greater disadvantage because consumers do not choose to shop on an open market if it is raining or snowing. One grower offered the suggestion that the new market building should be reconstructed to leave a large selling room running almost the length of the building in such a way as to permit those farmers selling eggs, cream, and poultry to be together and protected from climatic conditions.

Some of the corn growers suggested that the regulation prohibiting them from bringing corn to market before 4 o'clock in the morning worked to their disadvantage. To enable them to have a sufficient quantity on hand during the height of the season, it is necessary that they make several trips to market each day. With this restriction as to time of arrival they are unable to get their corn to market in time for the morning business.

Segregation or elimination of hucksters on the market was the suggestion which was mentioned most frequently by the gardeners. Their complaint was that the consumer was not able to distinguish between producer and non-producer and often bought inferior produce at a stall rented by a producer, only to find that the stall had been temporarily occupied by a huckster in the absence of the producer. To remedy this situation, sections have been set apart since October 1, 1937, for producers and non-producers, and if the regulations are enforced, the grower should have no cause for further complaint of this kind.

Another complaint of 24 growers, 9 of whom were gardeners and 9 potato growers, took the form of a suggestion that truckers should either be eliminated or controlled and the market reserved for only that produce which was grown locally. It was said that some of the truckers, in an effort to evade the provincial truckers' licence, had established small warehouses to enable them to be classified as wholesalers. The decision regarding such a complaint is definitely a matter of policy as to whether the Ottawa market is to serve as a local or as a regional market.

A portion of the market where produce is sold in wholesale quantities.

Many of the growers felt that there should be more facilities on the market. This covered a large range of suggestions and included the need for more sanitary provisions, better drainage, and expansion of the market.

As has already been mentioned in the introduction of this report, growers renting stalls on the market are required to pay two fees, a yearly rental and a daily fee. Fourteen of the growers felt that the cost of marketing was too high and three others thought the daily fee should be eliminated.

A complaint made mostly by the gardeners who have fairly large trucks, was that six-foot stalls are not wide enough for their trucks, and some also considered that this size of stall does not provide sufficient room for display.

One suggestion was that more encouragement might be given to wholesaling on the market. It is claimed that the retail storekeeper and other wholesale buyers at present, have frequently to carry their purchases a considerable distance to where their trucks are parked. Often the growers leave their stands to assist and run the chance of losing potential customers during their absence.

TABLE 18.—Complaints of Buyers on the By Ward Market as reported by Growers

—	Total	Gardeners	Farmers	Potato growers
	No.	No.	No.	No.
Market too cold; need for covered market and other facilities	40	12	23	5
Inadequate parking facilities	39	33	2	4
Unable to distinguish between grower and huckster	15	13	.....	2
Unable to distinguish between local and imported produce	4	4	.....	.....
Flower section too far from centre of market	3	3	.....	.....
Inadequate grading of produce	5	3	.....	2
Others	10	4	.....	6
Total complaints	116	72	25	19

Growers were asked what complaints concerning the By Ward Market they had heard from buyers and the three most common complaints concerned the need for a covered market, the inadequacy of parking facilities, and inability to distinguish between grower and huckster. Two of these complaints have already been discussed, while the other, the lack of proper parking facilities, is one which most buyers recognize as being a decidedly important one. Neither the wholesale nor retail buyer wants to carry his purchases two or three blocks to his car or truck, and it would appear desirable that some means should be devised which would enable the buyer to drive alongside the grower's stall to load his purchases.

Sales by Hucksters

In order to determine the amount of business carried on by non-producers, or by what are usually termed hucksters, 15 records were obtained from that group.

TABLE 19.—VALUE OF ALL PRODUCE SOLD AND PERCENTAGE DISTRIBUTION BY SOURCE OF PURCHASES BY 15 HUCKSTERS SELLING ON THE BY WARD MARKET, 1937

Commodities	Total value of sales	Per-centage	Percentage distribution of Purchases			
			From growers or truckers on the By Ward market	From growers at the farm	From whole-salers and jobbers	Total
	$	%	%	%	%	%
Vegetables	6,432	31·6	88·8	7·7	3·5	100·0
Potatoes	1,306	6·4	87·7	3·5	8·8	100·0
Small fruits	2,718	13·4	51·6	8·6	39·8	100·0
Tree fruits	7,653	37·7	50·7	9·9	39·4	100·0
Poultry products	2,061	10·2	41·6	58·4	.....	100·0
Other products	149	0·7	91·9	8·1	.....	100·0
Total	20,319	100·0	64·7	13·5	21·8	100·0

Total sales of 15 hucksters, as shown in Table 19, amounted to $20,319 made up of sales of fruits, vegetables, potatoes, poultry products, and other

produce. Tree fruits with a value of $7,653 accounted for 37·7 per cent of the total sales. These sales consisted chiefly of apples and imported produce. Tree fruits and small fruits, because of their rather limited local production, were chiefly obtained from truckers on the By Ward Market or from wholesalers and jobbers. Vegetables, purchased almost entirely from growers on the market or at the farm, made up 31·6 per cent of the total sales and were valued at $6,432.

The display of vegetables of an individual gardener.

Poultry products, which are of minor importance to hucksters, were obtained to a large extent from producers at the farm. Eggs represented the major portion of the sales.

The total number of days spent on the market by the 15 hucksters was reported as being 2,899 or an average of 193 days for the 12-month period October 1, 1936, to September 30, 1937. With average sales for the period being $1,354, the average sales per day for each huckster would be approximately $7. All the hucksters reported that their sales were made entirely to consumers.

TABLE 20.—ESTIMATED TOTAL SALES BY ALL HUCKSTERS ON THE BY WARD MARKET, 1937

Commodities	Value	Percentage
	$	%
Vegetables	23,389	31·7
Potatoes	4,749	6·4
Small fruits	9,884	13·4
Tree fruits	27,829	37·7
Poultry products	7,494	10·1
Other products	542	0·7
Total	73,887	100·0

The estimated total sales by all hucksters selling on the By Ward Market amounted to $73,887 (Table 20).

Buying and selling on the market or "huckstering" by producers is generally carried on by those growers who are selling at retail and want to keep a continuously good display on their stalls. Used in this sense, huckstering applies only to that produce which the grower purchases on the market for resale and is made up mostly of local produce.

TABLE 21.—ESTIMATED PURCHASES OF LOCAL PRODUCE ON THE BY WARD MARKET BY GARDENERS FOR RESALE, 1937

Type of Produce	Value	Percentage
	$	%
Vegetables	17,479	51·3
Fruits	4,137	12·1
Potatoes	1,267	3·7
Poultry products	10,560	31·0
Other products	655	1·9
Total	34,098	100·0
Season of Purchase—		
October–December	8,767	25·7
January–March	5,006	14·7
April–June	6,224	18·3
July–September	14,101	41·3
Total	34,098	100·0

TABLE 22.—PURCHASES OF LOCAL AND NON-LOCAL VEGETABLES, FRUITS AND POTATOES BY 64 INDEPENDENT RETAIL STORES LOCATED IN OTTAWA AND 8 STORES[1] LOCATED ON THE OTTAWA BY WARD MARKET, 1937

Number of records	Type of Store	Local Produce				Purchases, non-local, vegetables, fruits and potatoes	Total purchases from all sources, vegetables, fruits and potatoes
		Vegetables	Fruit	Potatoes	Total		
	By value	$	$	$	$	$	$
36	Grocery stores	16,926	7,743	8,571	33,240	58,323	91,563
9	Fruit stores	4,310	2,626	2,210	9,146	21,580	30,726
13	Meat shops	4,426	1,577	4,017	10,020	7,374	17,394
6	Independent chain stores	1,715	770	1,215	3,700	9,300	13,000
64	Total (not including By Ward Market stores)	27,377	12,716	16,013	56,106	96,577	152,683
8	By Ward Market stores	25,377	3,694	6,856	35,927	99,323	135,250
72	Grand total	52,754	16,410	22,869	92,033	195,900	287,833
	By percentage	%	%	%	%	%	%
36	Grocery stores	50·9	23·3	25·8	36·3[2]	63·7	100·0
9	Fruit stores	47·1	28·7	24·2	29·8	70·2	100·0
13	Meat shops	44·2	15·7	40·1	57·6	42·4	100·0
6	Independent chain stores	46·4	20·8	32·8	28·5	71·5	100·0
64	Total (not including By Ward Market stores)	48·8	22·7	28·5	36·7	63·3	100·0
8	By Ward Market stores	70·6	19·3	19·1	26·6	73·4	100·0
72	Grand total	57·3	17·8	24·9	32·0	68·0	100·0

[1]These are records from fruit and vegetable stores located on the By Ward Market, which do a certain amount of wholesale as well as retail business.

[2]Percentage local produce is of total produce purchased.

In table 21 the estimated total of $34,098 for all produce purchased for resale by producers on the market is given. Vegetables made up 51·3 per cent of the total and over half of this was purchased in the summer period July to September. Eighty per cent of the poultry products were purchased during six months from October to March. Total yearly poultry purchases were valued at $10,560 and were 31·0 per cent of the total.

Sales of Ottawa Independent Retail Stores

Seventy-two records were obtained from retail stores in Ottawa, eight of which were stores in the vicinity of the By Ward Market, doing some wholesale as well as retail business. This sample of 8 By Ward Market stores represents 44 per cent of the food stores in the By Ward Market area. The remaining 64 records represent 16·7 per cent of all Ottawa grocery stores, 32·1 per cent of fruit stores, 17·6 per cent of meat stores, and 35·3 per cent of independent or voluntary chain stores.

Figures were obtained of purchases of local and non-local produce, non-local referring to all produce not grown in the Ottawa valley.

Total purchases of the 72 independent retail stores from October 1, 1936, to September 30, 1937, amounted to $287,833 (Table 22). Of these total purchases, non-local made up 68 per cent valued at $195,900, while local purchases of vegetables, fruit, and potatoes were valued at $92,033. By Ward Market stores showed much higher percentage purchases of local vegetables than other Ottawa stores and lower percentage purchases of local fruit and potatoes.

TABLE 23.—Source of Supply of Local and Non-Local Vegetables, Fruits and Potatoes Purchased By 64 Independent Retail Stores Located in Ottawa

Source of Supply	Local vegetables	Local fruit	Local potatoes	Total local purchases	Non-local purchases	Total purchases vegetables, fruit and potatoes
By value	$	$	$	$	$	$
The By Ward Market	16,221	4,854	2,741	23,816	.....	23,816
Growers at store door	9,572	6,939	10,879	27,390	.....	27,390
Growers at farm	1,365	208	1,478	3,051	.....	3,051
Truckers at store door	174	295	407	876	1,405	2,281
Ottawa wholesalers and jobbers	45	420	508	973	93,507	94,480
Other sources	.....	.....	.....	.....	1,665	1,665
Total	27,377	12,716	16,013	56,106	96,577	152,683
By percentage	%	%	%	%	%	%
The By Ward Market	59·3	38·2	17·1	42·5	.....	15·6
Growers at store door	35·0	54·6	67·9	48·8	.....	17·9
Growers at farm	5·0	1·6	9·2	5·4	.....	2·0
Truckers at store door	0·6	2·3	2·6	1·6	1·5	1·5
Ottawa wholesalers and jobbers	0·1	3·3	3·2	1·7	96·8	61·9
Other sources	.....	.....	.....	.....	1·7	1·1
Total	100·0	100·0	100·0	100·0	100·0	100·0
Percentage of different classes of local produce	48·8	22·7	28·5	100·0	.....	.....
Percentage of local and non-local produce	.....	.....	.....	36·7	63·3	100·0

TABLE 24.—Source of Supply of Local and Non-Local Vegetables, Fruits and Potatoes Purchased By 8 Stores Located on the By Ward Market

Source of Supply	Local vegetables	Local fruit	Local potatoes	Total local purchases	Non-local purchases	Total purchases vegetables, fruit and potatoes
By value	$	$	$	$	$	$
The By Ward Market	16,079	3,664	5,494	25,237	.....	25,237
Growers at store door	7,905	30	1,050	8,985	.....	8,985
Growers at farm	943	.....	312	1,255	.....	1,255
Truckers at store door	450	.....	.....	450	5,176	5,626
Ottawa wholesalers and jobbers	.....	.....	.....	.....	94,147	94,147
Other sources	.....	.....	.....	.....	.....	.....
Total	25,377	3,694	6,856	35,927	99,323	135,250
By percentage	%	%	%	%	%	%
The By Ward Market	63·4	99·2	80·1	70·2	.....	18·7
Growers at store door	31·1	0·8	15·3	25·0	.....	6·6
Growers at farm	3·7	.....	4·6	3·5	.....	0·9
Truckers at store door	1·8	.....	.....	1·3	5·2	4·2
Ottawa wholesalers and jobbers	.....	.....	.....	.....	94·8	69·6
Other sources	.....	.....	.....	.....	.....	.....
Total	100·0	100·0	100·0	100·0	100·0	100·0
Percentage of different classes of local produce	70·6	10·3	19·1	100·0	.....	.....
Percentage of local and non-local produce	.....	.....	.....	26·6	73·4	100·0

Whereas stores located on the By Ward Market make very limited purchases of local fruits and potatoes other than on the market itself, other Ottawa stores purchase considerable quantities of these commodities at their store door which accounts for their increased purchases of such produce (Tables 23 and 24).

Total estimated purchases of all of the 352 independent retail stores in Ottawa from October 1, 1936, to September 31, 1937, amounted to $1,084,274 (Table 25).

TABLE 25.—Estimated Purchases of Local and Non-Local Vegetables, Fruits and Potatoes By All Independent Retail Stores Located in Ottawa (Including Stores Located on the By Ward Market), 1937

Type of Store	Number of stores	Per cent obtained in records	Local vegetables	Local fruit	Local potatoes	Total local purchases	Non-local purchases	Total all purchases
	No.	%	$	$	$	$	$	$
Grocery store	215	16·7	101,354	46,365	51,323	199,042	349,240	548,282
Fruit store	28	32·1	13,427	8,180	6,885	28,492	67,227	95,719
Meat shops	74	17·6	25,148	8,960	22,824	56,932	41,897	98,829
Independent chain	17	35·3	4,858	2,181	3,442	10,481	26,346	36,827
	334	.....	144,787	65,686	84,474	294,947	484,710	779,657
Stores located on the By Ward Market	18	44·4	57,155	8,320	15,441	80,916	223,701	304,617
Total value	352	.....	201,942	74,006	99,915	375,863	708,411	1,084,274

Of these total purchases non-local made up 65·3 per cent valued at $708,411 while local purchases of fruits, vegetables and potatoes were valued at $375,863.

TABLE 26.—Estimated Source of Supply of Local and Non-Local Vegetables, Fruit and Potatoes Purchased By All Independent Retail Stores Located in Ottawa (Including Stores Located on the By Ward Market), 1937

Source of Supply	Local vegetables	Local fruit	Local potatoes	Total local purchases	Non-local purchases	Total purchases vegetables, fruit and potatoes
By value	$	$	$	$	$	$
The By Ward Market	123,644	38,413	35,979	198,037	.....	198,037
Growers at store door	66,901	31,429	52,119	150,449	.....	150,449
Growers at farm	8,835	938	7,820	17,593	.....	17,593
Truckers at store door	2,389	1,331	1,778	5,498	24,086	29,584
Ottawa wholesalers and jobbers	172	1,895	2,219	4,286	678,658	682,944
Other sources	.....	.....	.....	.....	5,667	5,667
Total	201,943	74,006	99,915	375,863	708,411	1,084,274
By percentage	%	%	%	%	%	%
The By Ward Market	61·2	51·9	36·0	53·3	.....	17·0
Growers at store door	33·1	42·5	52·2	39·5	.....	12·6
Growers at farm	4·4	1·3	7·8	4·7	.....	1·5
Truckers at store door	1·2	1·8	1·8	1·4	3·4	2·8
Ottawa wholesalers and jobbers	0·1	2·5	2·2	1·1	95·8	65·5
Other sources	.....	.....	.....	.....	0·8	0·6
Total	100·0	100·0	100·0	100·0	100·0	100·0

Total purchases of local vegetables amounted to $201,943, the bulk of which, $123,644 was purchased on the Ottawa By Ward Market with $66,901 purchased from growers at the store door (Table 26). Local fruit purchases amounted to $74,006, $38,413 of which was purchased on the By Ward Market, with $31,429 direct from growers at the store door. Potatoes, on the other hand, showed a larger amount being obtained from growers at the door than from sellers on the By Ward Market, with $52,119 from the former and $35,979 from the latter.

Wholesalers and jobbers supplied 95·8 per cent of all non-local purchases of fruits, vegetables and potatoes made by independent retail stores.

Purchases of Ottawa Chain Stores

The four national chain stores operating in Ottawa; namely, The Great Atlantic and Pacific Tea Company, Limited, the Dominion Stores, Limited, Loblaw Groceterias Company, Limited, and Stop and Shop Limited, supplied information regarding their purchases of local and non-local vegetables, fruit, and potatoes. In 1937 they operated 51 retail stores in the city.

The bulk of their purchases were of non-local origin (Table 27). With total purchases valued at $340,389, non-local represented 86·3 per cent, or $293,889. Local purchases made up the remaining 13·7 per cent, with a value of $46,500. Vegetables represented 93·9 per cent of all local purchases, with fruit, in this case almost entirely small fruits, making up 4·7 per cent. Purchase of local potatoes by chain stores is decidedly limited, being only 1·4 per cent of all local purchases. This is mainly due to lack of proper grading and packaging compared with potatoes from the Maritime Provinces.

TABLE 27.—Purchases of Local and Non-Local Produce By Four Ottawa Chain Stores, 1937

Origin	All produce	All produce	Local produce
	$	%	%
Local—			
Vegetables	43,633	12·8	93·9
Fruit	2,186	0·7	4·7
Potatoes	651	0·2	1·4
Total local produce	46,500	13·7	100·0
Total non-local fruits and vegetables	293,889	86·3	.....
Total all produce	340,389	100·0	.....

More than one-half of the local produce was purchased at the store door with Ottawa wholesalers and jobbers supplying nearly 30 per cent (Table 28). Only 10 per cent was purchased at the By Ward Market. Ottawa wholesalers and jobbers supplied 87 per cent of the non-local produce, while the remainder came from truckers and other sources.

TABLE 28.—Source of Supply of Local and Non-Local Produce Purchased by Four Ottawa Chain Stores, 1937

Source of Supply	Value			Percentage		
	Local	Non-local	Total	Local	Non-local	Total
	$	$	$	%	%	%
By Ward Market	4,825	.....	4,825	10·4	.....	1·4
Growers at store door	26,397	.....	26,397	56·7	.....	7·8
Growers at farm	740	.....	740	1·6	.....	0·2
Truckers at store door	740	13,805	14,545	1·6	4·7	4·3
Ottawa wholesalers and jobbers	13,428	255,650	269,078	28·9	87·0	79·0
Other sources	370	24,434	24,804	0·8	8·3	7·3
Total	46,500	293,889	340,389	100·0	100·0	100·0

Estimated Turnover of Local Fruits and Vegetables in Ottawa

The total turnover of local fruits and vegetables for the year ended September 30, 1937, has been estimated on the basis of growers' sales on the By Ward Market and on the estimate of retail store purchases from growers direct who do not patronize the By Ward Market.

TABLE 29.—Total Estimated Turnover of Local Fruits and Vegetables (Not Including Potatoes) in Ottawa From October 1, 1936-September 30, 1937

——	Total sales on the By Ward Market	Total sales to independent stores	Other sales	Total
	$	$	$	$
Vegetables—				
Gardeners	236,252	43,260	38,195	317,707
Farmers	2,903	671	2,474	6,048
Growers not using By Ward Market	.....	31,805	37,826	69,631
Total vegetables	239,155	75,736	78,495	393,386
Fruits—				
Gardeners	14,326	2,131	3,275	19,732
Farmers	2,018	103	226	2,347
Growers not using By Ward Market	.....	30,133	33,036	63,139
Total fruits	16,344	32,367	36,537	85,248
Total fruits and vegetables	255,499	108,103	115,032	478,634

Vegetables sold by growers not patronizing the By Ward Market totalled $69,631 or 17·7 per cent, while fruit sales of the same group totalled $63,169, or 74·1 per cent of all fruits. This difference in percentage might be accounted for by the fact that local fruits, consisting chiefly of raspberries and strawberries, are a short season crop grown usually by specialists. For this reason such growers do not rent yearly stands on the market and rather than chance selling on inferior parts of the market, contract direct with independent stores and consumers for the larger portion of their crop.

The total estimated sales of locally-grown potatoes in Ottawa in 1937 amounted to $410,300. Total sales in Ottawa of locally-grown fruits, vegetables and potatoes in 1937 have been estimated, therefore, to equal approximately $890,000.

The estimated value of vegetables, viz. $393,386, is divided between the different vegetables on the basis of the value reported by 285 growers. This estimate is given in table 30 and presented in figure 7 on a percentage basis, giving also the actual value of the sales of 285 growers.

Table 30.—Estimated Value of Vegetables Grown in Ottawa District, 1937

Vegetables	Value	Vegetables	Value
Tomatoes	$ 56,490	Melons	$ 13,493
Cucumbers	42,250	Turnips	12,903
Corn	30,723	Beets	10,543
Carrots	30,370	Radishes	9,600
Lettuce	29,150	Asparagus	9,598
Celery	29,111	Spinach	9,481
Cabbage	25,767	Rhubarb	8,143
Cauliflower	25,177	Beans	7,474
Onions	16,900	Other vegetables	27,063
Total			$393,386

Tomatoes make up 14·4 per cent of the total value, followed by cucumbers, corn and carrots totalling 10·7 per cent, 7·8 per cent and 7·7 per cent, respectively.

The estimated acreage on which this quantity of vegetables was grown is 2,451.

Railway Carlot Arrivals of Fruits and Vegetables

In the twelve months October 1936, to September, 1937, 1,539½ carlots of fresh fruits and vegetables were unloaded in Ottawa. The greatest number of cars was received in May (Figure 8) when 189, or 12·4 per cent of the 12-month total, arrived. The monthly total increased gradually from the January low of 84 cars (5·5 per cent) up to the high point in May and declined again to August when 119 cars or 7·5 per cent were received. Heavy fruit arrivals led to a secondary seasonal high of 175 cars (11·4 per cent) in September. The last three months of the previous year showed totals somewhat under the average for the year and there was a steady decline from November to January.

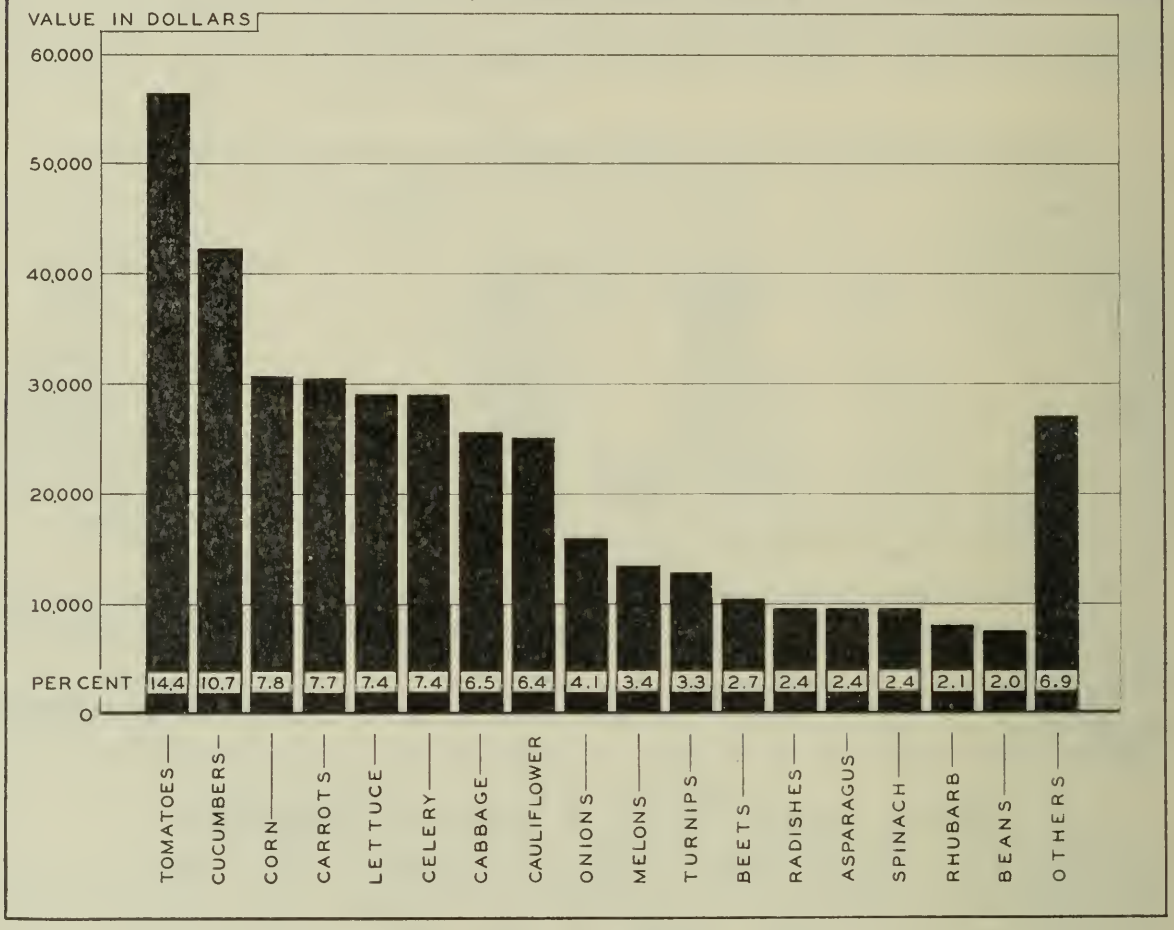
Bananas, potatoes and oranges were the leading commodities arriving in carlots, as may be seen by reference to Figure 9. The respective numbers of "unloads" were 289½, 210 and 197, and the combined percentage 45·2. Other citrus fruit (grapefruit, lemons and mixed citrus) arrived in 105 cars, being 6·8 per cent of the total, and there were 100 cars of tomatoes representing 6·5 per cent. Other leading single commodities were apples (85 cars), lettuce (72 cars), celery (48 cars) and grapes (43 cars). All cars of fruit totalled

878½ cars or 57·1 per cent, potatoes and sweet potatoes 220 cars or 14·3 per cent, other vegetables 385 cars or 25 per cent, and mixed fruit and vegetables 56 cars or 3·6 per cent.

Points of origin included countries as far distant as Egypt and Italy, whence came onions and lemons, respectively. From Canadian points there were 484½ cars, including 225½ from Ontario, 147 from New Brunswick, 35 from Nova Scotia, 32 from Prince Edward Island, 23 from Quebec and 22 from British Columbia. Twenty-one states sent 631 cars into Ottawa from the United States. Fifteen other countries supplied 424 cars.

FIGURE 7: ESTIMATED VALUE OF VEGETABLES GROWN IN THE OTTAWA DISTRICT

(PERCENTAGES SHOWN FOR EACH VEGETABLE)



Records of Six Wholesalers

Records of purchases and sales were taken from six Ottawa firms engaged in wholesaling fruits and vegetables, the records being for business during the same 12-month period as that used throughout the survey, October, 1936, to September, 1937. These wholesalers unloaded 835 cars or 54·2 per cent of the number arriving during the period. The value of the contents laid down in Ottawa was $1,061,627, an average of $1,271 per car, and was 84·7 per cent of all non-local produce purchased by the firms. The other 13·3 per cent was valued at $192,703 and was estimated to be equivalent to 200 cars or an average of $964 per car-equivalent. The lower average is to be expected because trucked and l. c. l. shipments would generally move a shorter average distance, with correspondingly smaller carrying charges per unit of weight. A further analysis of the produce not received in carlots shows that over half of it was purchased from country dealers, about a third from trucker-dealers, and the remainder from other sources.

FIGURE 8: RAILWAY CARLOT UNLOADS OF ALL FRUITS AND VEGETABLES IN OTTAWA BY MONTHS. 1936–1937

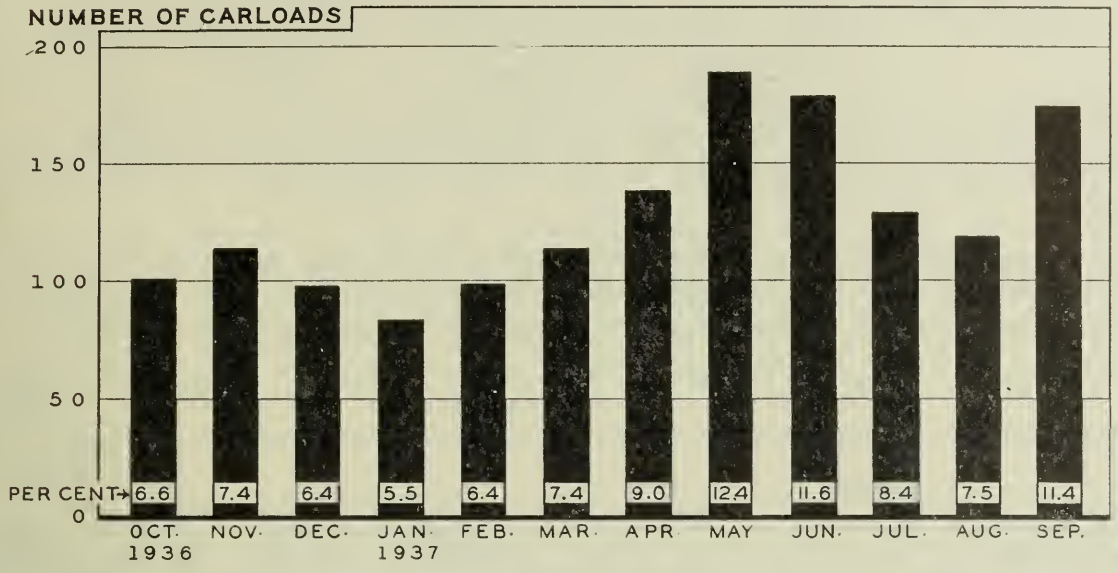
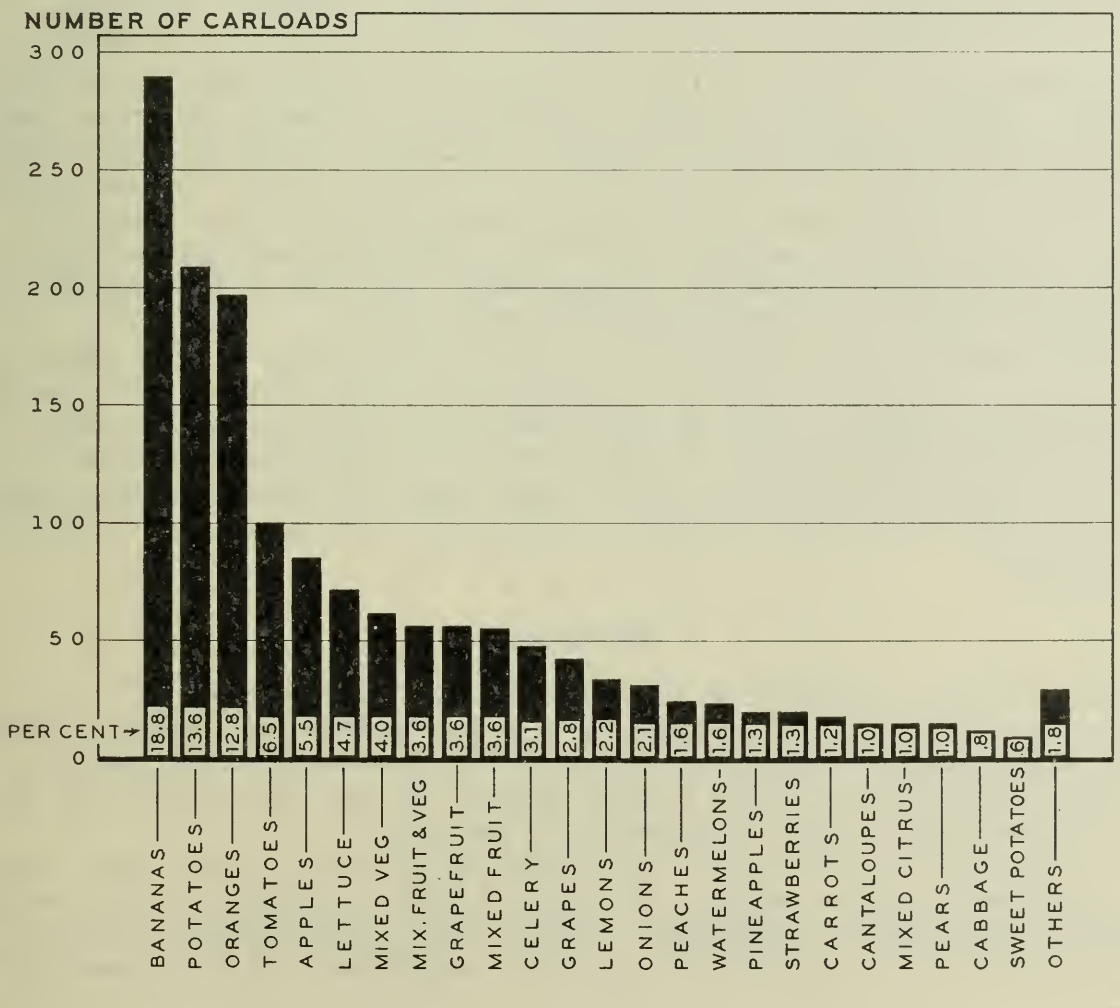


FIGURE 9: RAILWAY CARLOT UNLOADS OF FRUITS AND VEGETABLES IN OTTAWA. OCT. 1936 — SEPT. 1937



In table 31 the division of these purchases as well as of purchases of local produce by class of commodity, with the percentage distribution in each case and the total is shown. More than half the non-local produce is fruit and most of it of a kind not grown in Canada at any season of the year. About two-thirds of the vegetables purchased by these wholesalers come from areas outside Ottawa. However, most of the vegetables are also grown locally and during the local growing season, importations are reduced to a minimum. Importations of potatoes, the value of which made up nearly one-eighth of non-local purchases by these firms, are less affected by the local harvest. Most of those brought in at any season are from New Brunswick and Prince Edward Island.

TABLE 31.—Purchases of 6 Ottawa Wholesale Fruit and Vegetable Firms, October, 1936 to September, 1937, according to kind of commodity and local or non-local origin

——	Vege-tables	Fruit	Potatoes	Total
By value	$	$	$	$
Local produce	2,640	2,000	8,050	12,690
Non-local produce	425,522	682,176	146,632	1,254,330
Total purchases	428,162	684,176	154,682	1,267,020
By Percentage	%	%	%	%
Local produce	20·8	15·8	63·4	100
Non-local produce	33·9	54·4	11·7	100
Total purchases	33·8	54·0	12·2	100

It is apparent that these firms are concerned to only a very limited extent with the purchase of local produce. The reason is that there is no actual service which they can perform to justify a mark-up. In other words, buyers for wholesale houses have no better access to sources of supply of such produce than their customers. Similarly, these general wholesale houses do not import produce during the local season, except when a definite difference in quality or variety enables them to obtain a premium price. In all cases, however, imports of similar produce were reduced during the local season.

The firms were not questioned as to the money value of their sales, but only as to the percentage division of their sales as between classes of customers. The composite figure for the six firms based on cost price, which means an assumption that mark-up was the same for all produce, showed sales to the Ottawa independent retailers to be 74·7 per cent, the Ottawa grocery chains, 11·4 per cent, other Ottawa buyers 6·4 per cent and out-of-town customers, 7·5 per cent.

Summary

Sales of farm products on the Ottawa By Ward Market for the year ended September 30, 1937, amounted to approximately one million dollars. Of this total, sales of vegetables represented 24 per cent, animal products 23 per cent, potatoes 20 per cent, poultry products 18 per cent, fruit 9 per cent, flowers 5 per cent and other commodities 1 per cent.

The estimated wholesale or farm value of all locally-grown fresh fruits, vegetables and potatoes sold in the city of Ottawa during the year ended September 30, 1937, was $890,000. Of this total, approximately 46 per cent represented the value of potatoes, 44 per cent vegetables and 10 per cent fruits.

Nearly 1,200 different producers sold produce on the By Ward Market during the year of the study. The average annual value of each gardener's sales was $2,629, each farmer's sales $2,094 and each potato grower's sales $1,513.

The average distance from the market of the growers' farms was 9·1 miles. Market gardeners were closer to the market on the average than farmers and potato growers.

Growers came to the market by 6 main routes.

Approximately 50 per cent of the growers' sales of all products on the By Ward Market were direct to consumers. Consumers took about 73 per cent of the poultry products, 66 per cent of the animal products and 90 per cent of the flowers, but only 35 per cent of the vegetables and 37 per cent of the potatoes.

Forty-three per cent of the 285 growers from whom records were obtained brought their produce to market in motor trucks and 29 per cent in motor cars.

Gardeners brought 70 per cent of their produce to market during the period April 1 to September 30, but farmers made only 45 per cent of their sales on the market in the same period.

Sales of market hucksters for the year were estimated at approximately $74,000.

The value of purchases for the year of fresh fruits, vegetables and potatoes from all sources by independent retail stores in Ottawa was estimated at about $1,084,000, of which locally-grown produce represented 35 per cent and non-local produce 65 per cent. Of the local produce, 57 per cent comprised purchases of vegetables, 25 per cent potatoes and 18 per cent fruits.

Independent retail stores obtained about 33 per cent of their needs of fresh fruits, vegetables and potatoes from the By Ward Market, 40 per cent from growers at the store door, 5 per cent from growers at the farm, and 2 per cent elsewhere.

The estimated value of the purchases of fresh fruits, vegetables and potatoes by the 4 chain grocery stores in Ottawa was about $340,400. Of this total, 14 per cent was local produce and 86 per cent non-local. Of the local produce, 10 per cent was obtained at the By Ward Market, 57 per cent from growers at the store door, 29 per cent from wholesalers and jobbers, and the balance elsewhere.

It was estimated that 2,450 acres were devoted to the production of vegetables (not including potatoes) in the Ottawa district.

During the year ended September 30, 1937, 1,540 railway car loads of fresh fruits, vegetables and potatoes were unloaded in Ottawa. Produce was received from 6 different provinces, from 21 states of the United States, and from 15 other countries.

Six Ottawa fruit and vegetable wholesalers and jobbers purchased during the year produce having a value laid down in Ottawa of $1,267,000. Locally-grown produce represented only about 1 per cent of this total value.

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